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Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

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New International Travel Figures Boost U.S. Tourism Earnings

New figures released by the U.S. Travel and Tourism Administration (USTTA) show that international travelers are spending more money in the United States than previously estimated, according to Rockwell Schnable, under secretary of commerce for travel and tourism.

The new estimates computed by the Bureau of Economic Analysis (BEA) are based on the in-flight survey conducted by USTTA. Previously, the BEA used estimates based on a survey dependent on a form which international visitors were asked to mail back.

The in-flight survey, filled out by outbound travelers, showed that foreign visitor spending in the U.S. on food, lodging, purchases, and fares was $37.1 billion -- $12.4 billion more than previous estimates based on the old survey method.

With this improved data base, USTTA estimates that in 1988 U.S. tourists spent only $2.9 billion more outside the U.S. than foreign visitors spent here. This is $4.7 billion less than the imbalance estimated using the old method.

At $37.1 billion, tourism is now a greater export revenue generator than agriculture, chemicals, and motor vehicles.

The new figures also show that the U.S. tourism balance with Japan is in surplus of $4.5 billion - Japanese tourists spent $4.5 billion more for travel to the U.S. in 1988 than American travelers spent for travel to Japan. ##

Forum Looks at Reshaping America's Highways and Skyways

J. Kay Aldous, vice president of public and government services for the American Automobile Association, will discuss the prospects for America's aging highways and skyways and how their present conditions are affecting Americans' decisions to travel at the US Travel Data Center's fifteenth annual Travel Outlook Forum on October 3, 1989, at the Diplomat Resort and Country Club in Hollywood, Florida. The forum is cosponsored by the Travel and Tourism Research Association (TTRA), and precedes the Travel Industry Association's (TIA) Travel Industry National Conference.

The theme of this year's forum is "1990 - Gateway to a Decade." Travel experts from all major sectors of the industry will offer their predictions on the outlook for travel and tourism in 1990 and the next decade.

Using data compiled by the Data Center, Aldous will reveal new findings on consumers' attitudes towards automobile and air travel. Is traffic congestion affecting vacation travel on the nation's highways and skyways? Do Americans consider driving time part of their vacation, or do they dread the thought of possible delays? What other travel factors or problems influence consumers' vacation plans?

Aldous oversees several departments within AAA including public relations, publications and traffic safety, highway transportation, and legislative affairs. He also serves as chairman of the U.S. Congressional Travel and Tourism Caucus advisory board and chairing the World Traffic Commission, International Touring Alliance.

For more information or to register for the forum and conference, contact the Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. 20036; 202/293-1040. ##

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June Travel Prices Show Moderate Gain

The cost of travel in the United States rose 0.6 percent in June, a moderate gain balanced by increases in entertainment and lodging costs and a decline in motor fuel prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures the seasonally unadjusted changes in the cost of travel in the U.S., reached 127.1 (1982 - 84 = 100) in June. For comparison, the Consumer Price Index (CPI) reached 124.1, a 0.2 percent increase over the previous month (see chart).

Travel Price Index and Components

June 1989 TPI Component	Monthly % Change May to June 1989	Annual % Change June 1988 to June 1989
Transportation	-0.1	12.8
Airline Fares	0.6	6.1
Other Intercity Trans.	1.2	3.9
Intracity Public Trans.	0.0	3.2
Motor Fuel	-0.6	17.9
Lodging	1.5	2.9
Food and Beverages Away From Home	0.3	4.6
Entertainment	1.6	8.1
TRAVEL PRICE INDEX	0.6	5.7
CONSUMER PRICE INDEX	0.2	5.2

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

The cost of lodging while out of town rose 1.5 percent in June; entertainment prices increased 1.6 percent. The cost of motor fuel, however, declined for the first time in several months, down 0.6 percent from May 1989.

The overall cost of transportation decreased in June, falling 0.1 percent. Airline fares rose 0.6; other intercity public transportation costs climbed 1.2 percent, while intracity public transportation showed no change.

The overall cost of travel in the U.S. climbed 5.7 percent over the past 12 months since June 1988, led by a 17.9 percent jump in motor fuel prices and a 12.8 percent increase in transportation costs. The CPI increased 5.2 percent for the same period. ##

May Travel Jumps 7 Percent

May travel volumes increased nearly 7 percent over year-earlier levels, due to strong growth in all travel segments, including a sizeable gain in business travel for the month, reports the Data Center's National Travel Survey (NTS).

The monthly telephone survey reports that Americans took 111 million person-trips in May. (A person-trip measures each time one person takes one trip 100 miles or more away from home.)

The May NTS also revealed that:

- Vacation travel and weekend travel both increased 5 percent;
- Air travel rose 3 percent, while travel by auto grew 10 percent; and
- Use of hotels rose nearly 9 percent.
- The average round-trip distance lengthened to 1,000 miles per trip, up from 960 one year ago, yet the average duration of trips fell from four nights last year to just 3.2 nights in May 1989.

Traveling With Children Rises in 1988

The number of trips involving adults and children traveling together increased more than 7 percent in 1988, accounting for 17 percent of all trips, reports recent findings of the National Travel Survey.

"Short and sweet" tended to be the dominating characteristic of trips including children last year. More than half of all such trips occurred over a weekend or long weekend compared to 39 percent when adults traveled without the little ones.

The National Travel Survey also found that:

- Vacation trips accounted for a substantially higher percentage of trips with children than those without. More than 75 percent of all trips including adults and children were for vacation, while 57 percent of adult-only trips counted as vacation travel.
- In 1988, however, 5 percent of all business trips (8 million trips) included children, up 2 percent from 1987.
- Adults traveling with children tended to stay somewhat closer to home than those without children. Trips with kids averaged 860 miles round-trip, while adult-only trips averaged nearly 1,000 miles round-trip.

(continued on page 3)

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- Adults traveling with youngsters also prefer to go by car. Last year, 85 percent of trips with children involved an automobile, truck, or recreational vehicle as the primary mode of transportation, while just 12 percent traveled by air.

- The same regions of the country that produced the greatest concentration of trips with kids also attracted the most. The South Atlantic, East North Central, and Pacific are all popular regions of the U.S. for travel with children. ##

TEIM Update

The Data Center's Travel Economic Impact Model (TEIM) revision project team is interviewing past clients and other data users within the travel industry who are familiar with TEIM economic impact studies. Through these interviews the project team will ask for suggestions for improvement in the model's output data and find out what types of additional information would be useful.

These comments will serve as useful input to assist the project team to identify data user needs, any problems with statistics generated from the TEIM and other models, and additional estimates that might be appropriate for inclusion in plans for the revised model.

The entire TEIM revision project will be completed in the first half of 1990.

For more information about the Travel Economic Impact Model, the revision project, or the model's capabilities, contact Dr. William Fleming, manager of economic studies, US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. ##

New Data Center Product Announcement

The Data Center's travel economic impact studies are now easy to present to groups. Estimates of U.S. travel spending in individual states, counties and cities, as well as the impact of this spending on payroll income, employment, and state and local tax revenue are available on slides complete with script with camera-ready copy of all charts and tables.

These new features are available through a graphics package incorporated exclusively with Data Center travel economic impact studies.

Travel industry officials can use travel economic impact studies and presentations to support tourism development not only at the state level, but locally as well.

With no prepartion, organizations can efficiently:

- educate area legislators and economists about the widespread contributions of travel and tourism in their area;

- increase productivity of tourism employees by showing how their contributions elevate the economic well-being of their community;

- demonstrate to the public (through the media and other avenues) the beneficial effects of travel activity in generating jobs, income, and tax revenue.

For further information about travel economic impact studies and the benefits of the new graphics products, contact Sarah Garrison, economic analyst at the US Travel Data Center; 202/293-1040. ##

Visitor Volume at National Parks

Region	MAY 1989 visits	% Change from MAY 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	1,369,071	7.7	10.4%
MIDDLE ATLANTIC	3,079,836	-8.1	-0.3
SOUTH ATLANTIC	9,182,088	-1.7	-1.9
EAST SOUTH CENT.	2,011,313	-4.5	-3.6
EAST NORTH CENT.	556,934	-13.3	-5.8
WEST NORTH CENT.	908,129	2.3	3.6
WEST SOUTH CENT.	1,170,592	1.0	5.0
MOUNTAIN	3,967,912	3.6	4.2
PACIFIC	4,348,941	-11.3	-5.1
TOTAL	26,594,816	-3.2	-1.0

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	May	$ 5,068	million	-1.5	9.5	9.4
Eating and Drinking Places(2)	May	$13,537	million	-0.2	5.8	7.5
Gasoline Service Stations(2)	May	$ 9,371	million	2.0	10.5	6.1
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	May	63.9	percent	0.6	2.7	1.6
Real Demand for Commerical Lodging(4)	May	62.2	million	0.1	5.6	4.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	May	26.1	billion	3.2	-3.1	-2.9
Int'l Revenue Passenger-Miles	May	8.3	billion	15.1	11.5	10.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	May	42.0	billion	0.2	-4.3	3.0
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	May	507.0	million	2.1	5.7	8.7
Travel Price Index (1982 - 84 = 100) (8)	May	126.3		0.5	5.7	4.9
U.S. Resident Travel						
Total Person-trips(9)	May	110.9	million	36.7	6.5	6.5
Vacation Person-trips(9)	May	71.2	million	54.8	4.7	10.6
Total Person-nights(10)	May	357.0	million	28.3	-14.4	-1.8
Vacation Person-nights(10)	May	254.0	million	35.0	-15.5	4.4
Public Use of National Parks (11)						
Visits	May	26,594,816		26.4	-3.2	-1.0
Overnight Stays	May	1,497,272		61.4	3.8	-0.3
Foreign Arrivals to the U.S.						
From Overseas(12)	Apr	1,033,861		-6.2	22.6	15.8
From Canada(13)	May	1,172,309		-5.7	8.4	13.6
From Mexico(12)	Apr	79,460		-28.8	23.8	30.5
U.S. Citizen Departures						
To Overseas(12)	Apr	1,104,700		-2.0	3.7	4.6
To Canada(13)	May	1,027,408		72.8	-4.4	-4.2
Domestic Demand for Gasoline						
Barrels/Day(14)	May	7,416	thousand	3.7	1.6	0.1

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: IS Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 19% arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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